



# What's Next: 4 Shifts Reshaping Business in 2025

**Morning Light**  
STRATEGY  
The future is old.

AgeTech  
Collaborative™  
FROM AARP®

Morning Light Strategy is a participant in AgeTech Collaborative™ from AARP®

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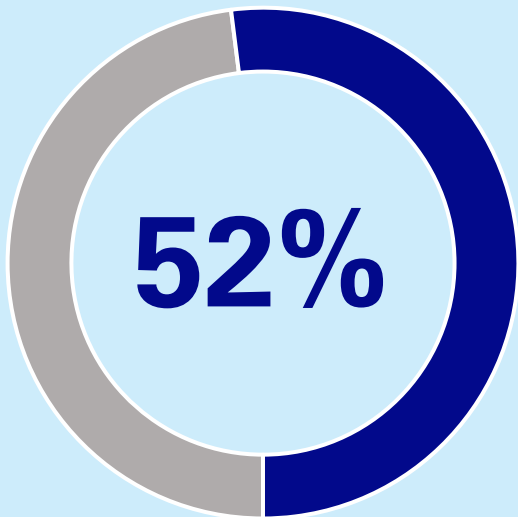
50+ consumers account for

**52%**

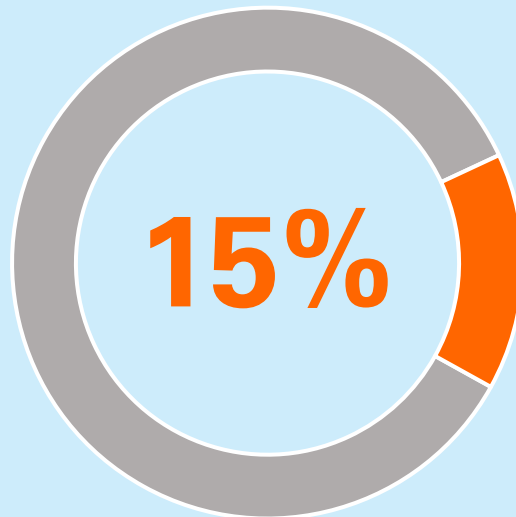
of annual US consumer  
spending

# Yet, most brands still treat aging like a niche

50+ % of US Consumer Spending



50+ % of Online Media Images



50+ isn't just a  
market to recognize  
– it's the space  
where the next  
major consumer  
shifts will happen  
first.



## What's Next?

# 4 Key Drivers Shaping Aging & Business in 2025



**Gen X is  
Redefining  
50+**



**Midlife women's  
economic power  
is expanding**



**Caregiving is a  
major economic  
force**



**Longevity is  
reshaping health &  
wellness**

# 01. Gen X is Redefining 50+

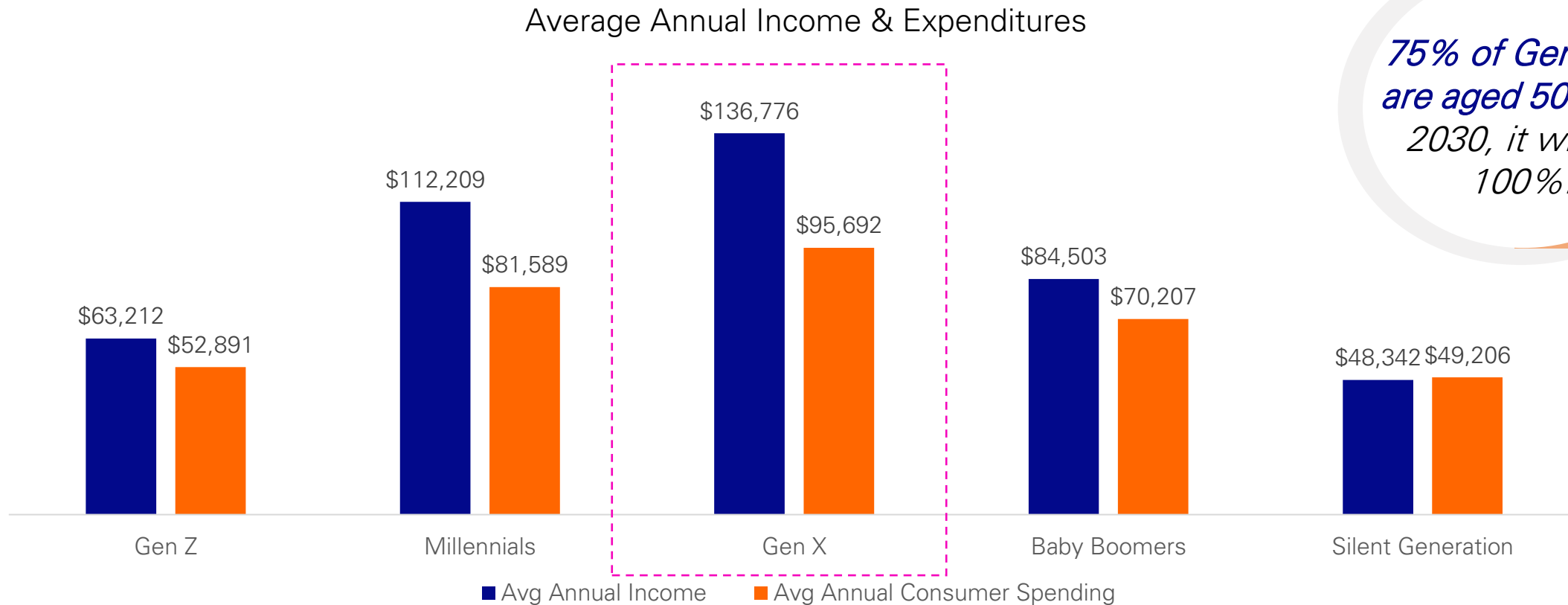
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Gen X has the **highest spending power of any generation**, but feels invisible in marketing.



# Gen Xers have hit peak earning – and spending – levels.

On average, they are outearning and outspending all other generational cohorts.

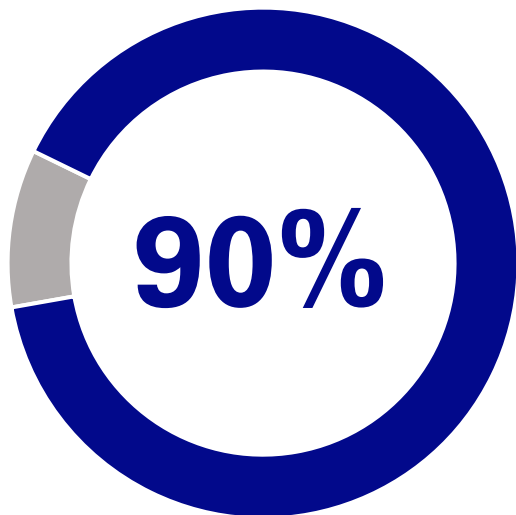


*75% of Gen Xers are aged 50+. By 2030, it will be 100%.*

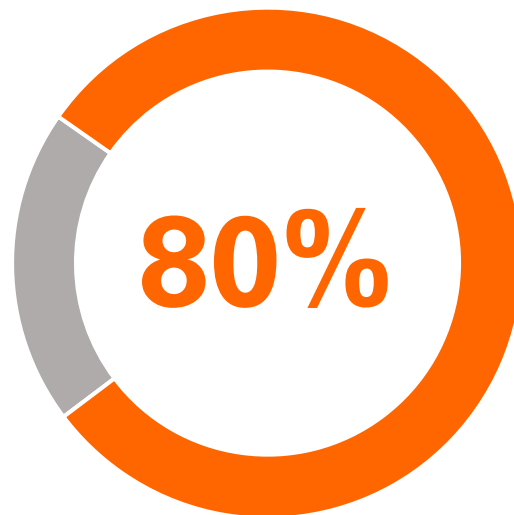
# Gen X: Digital-first, skeptical, experience-driven

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Smartphone ownership



Social Media Usage



# Gen X Opportunities

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How can we optimize retail & digital marketing to meet their needs?

- **AI-Powered Personalization**
- **Better online-to-offline Integration**
- **Brand Trust & Loyalty Strategies**



# Gen X: Investing, Spending, Working

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45%

of Gen X say they are not financially prepared for retirement.

30%

% of Gen X are actively supporting both their children and aging parents



# Gen X Opportunities

How can financial services adapt?

- **Delayed retirement solutions**
- **Financial literacy & wealth transfer**
- **Investment & insurance flexibility**



# Gen X: Proactive wellness, not anti-aging

**70%**

of consumers over 50 actively use digital health tracking.

**\$15B**

Projected size of brain health supplements market by 2030.



# Gen X Opportunities

What will it mean for health & wellness?

- **Personalized nutrition & supplements**
- **Longevity & mobility**
- **Mental & cognitive health**



## 02. Midlife women's economic power is expanding

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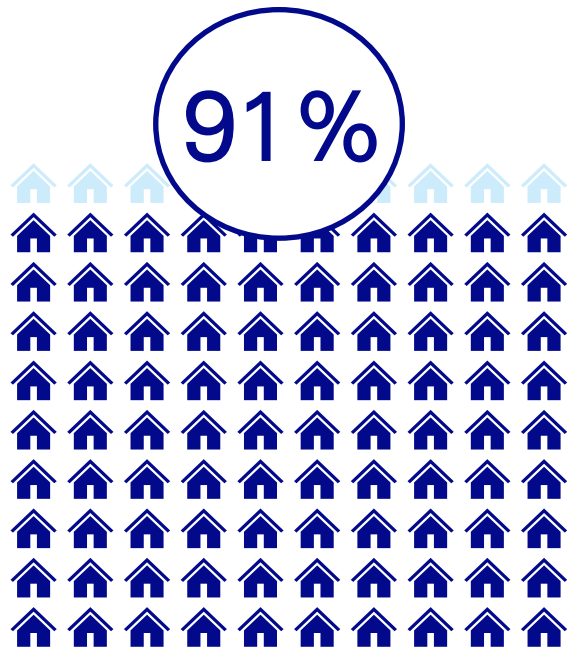
Women 40+ control trillions in spending – but are still underrepresented.



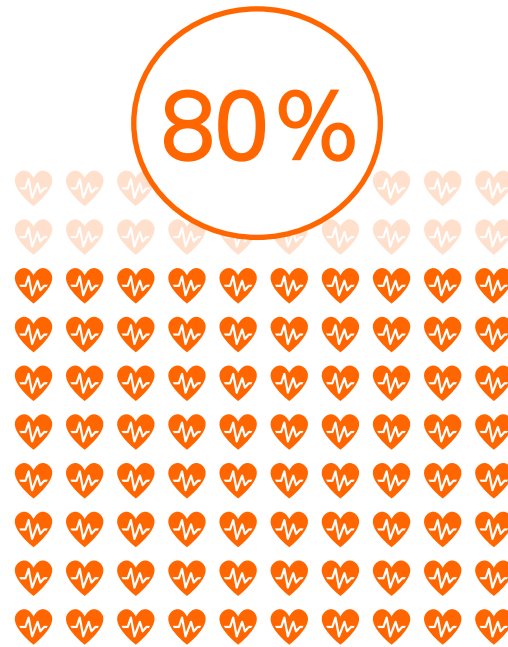
# Midlife women are a powerful economic force.

Estimates of their purchasing power in the US range from \$5 - \$15 trillion annually

% of purchases accounted for by women in US



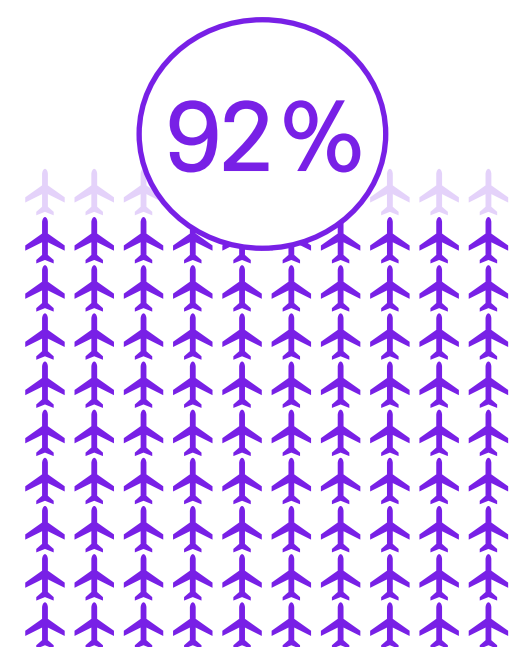
New home purchases



Healthcare decisions



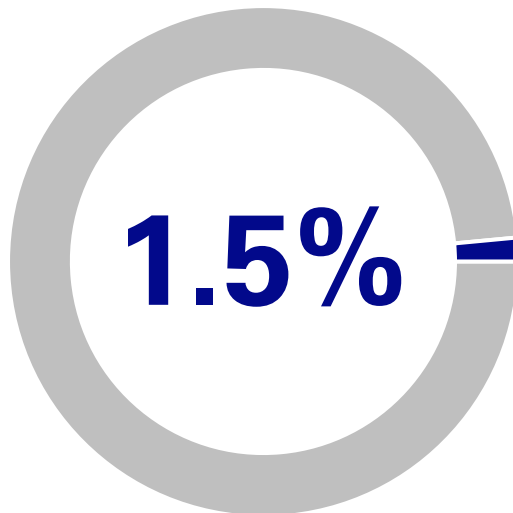
New car purchases



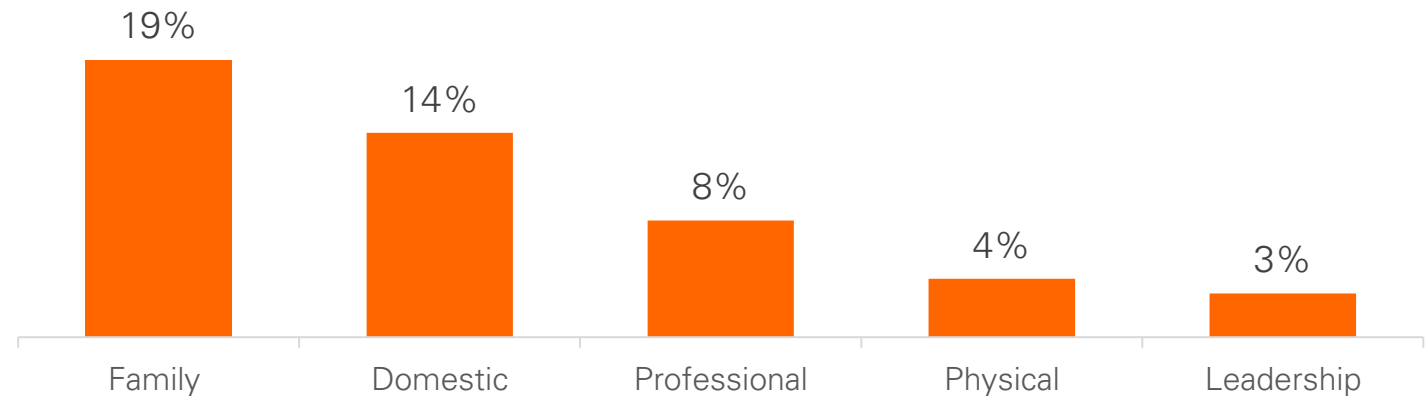
Travel decisions

# So why do brands still act like they disappear after 40?

% of Digital Ads Featuring Older Women



Portrayal of Women in Digital Ads



# Midlife women: High spenders, underserved.

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Women over 50 are the **largest demographic with incomes >\$100K**

The average adventure traveler is a **47-year-old female who wears a size 12 dress.**



# Midlife Women

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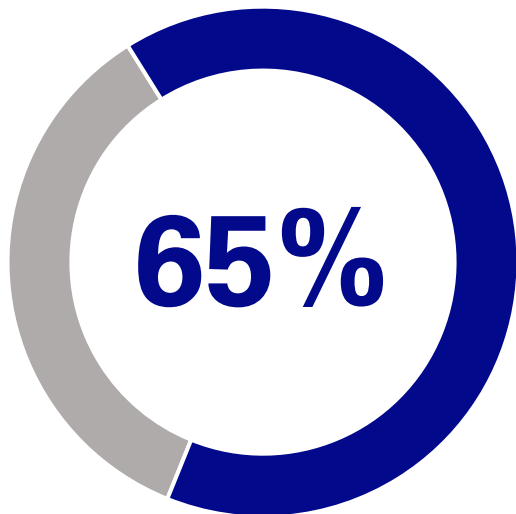
How can we optimize **retail & marketing** to meet their needs?

- **Experienced-based retail**
- **Tailored luxury**
- **Authentic marketing**

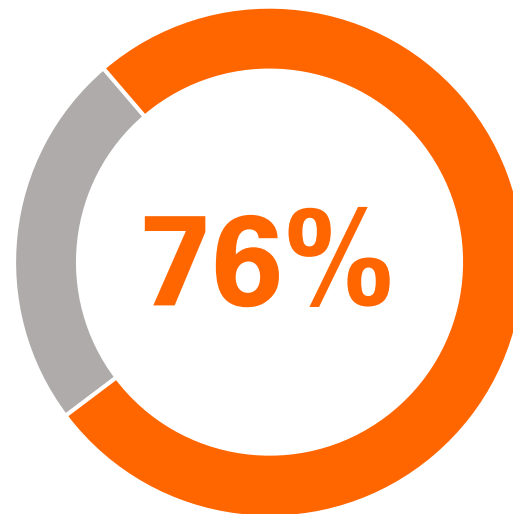


# Midlife women: The most overlooked car buyers

% of New Car Purchase decisions



Feel Auto ads are out of touch



# Midlife Women

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How do we re-think outdated gender norms in industries like auto & tech?

- **Rethink the retail experience**
- **Design for her priorities**
- **Transform service & repair**



# Midlife women: The Meno Market

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6000

US women enter  
menopause **every**  
**day.**

64%

of women aged  
36-40 report  
peri(menopause)  
symptoms.



# Midlife Women

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How do we deliver personalized, shame-free innovation?

- **Menopause-specific innovation**
- **Science-driven wellness solutions**
- **Authentic representation**



# 03. Caregiving is a major economic force

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Caregiving is a **\$600 billion shadow economy** – mostly invisible to brands.





**42  
Million**

Americans provide  
unpaid care to an  
adult 50+

# Caregivers are making major purchase decisions everyday.

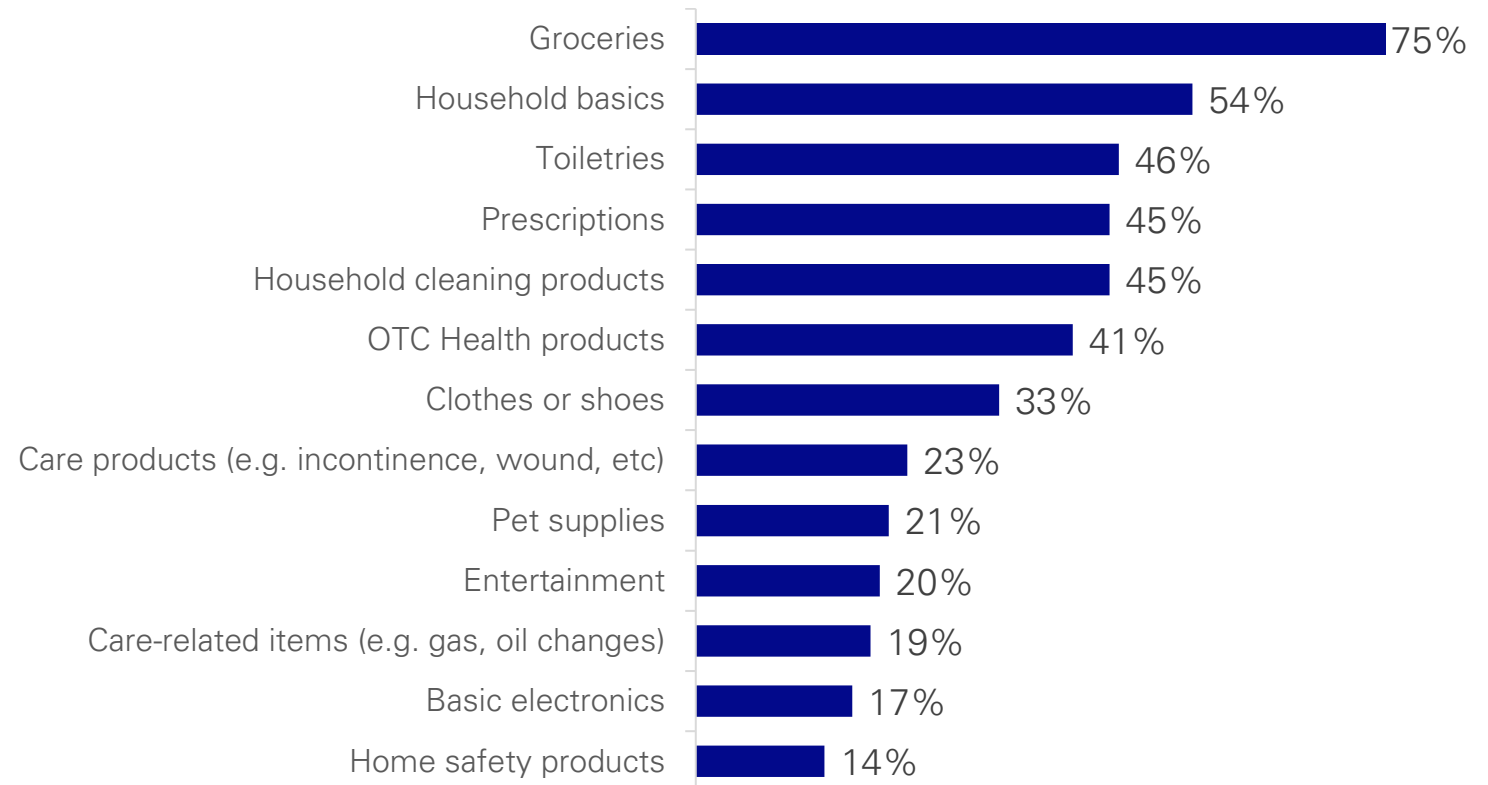
93%

Of Caregivers shop for their care recipient

73%

Pay for items using their own money or a combo of their money + recipient's money

Purchase Types



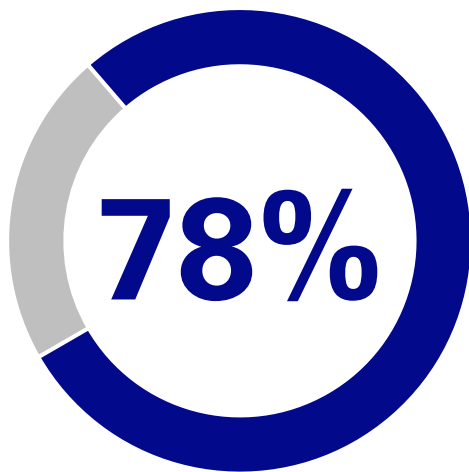
**Caregivers aren't just spending – they're entering new aisles, trying new brands and making decisions for others.**

**Caregiving changes how people shop.**

Over **50%** of caregivers buy **OTC medications** without recipient input!

# Caregiving: Not just an emotional responsibility

% Incurring Routine Out-of-Pocket Costs



Caregivers spent, on average,

**\$7,242**

Of their own money on caregiving expenses



# Caregiving Opportunities

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How can we help support them in the workplace and in financial planning?

- **Flexible savings & investment products**
- **Caregiving-integrated retirement planning**
- **Workplace caregiving benefits**



# Caregivers: The system isn't built for them.

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**72%**

of Caregivers manage complex healthcare needs.

**58%**

of caregivers say navigating the healthcare system is too difficult.



# Caregiving Opportunities

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How can healthcare and insurance make it easier?

- **AI-powered healthcare navigation**
- **Insurance plan coverage**
- **Pharmacy & medication management**



# Caregivers: Overworked and overstressed

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Caregivers spend an average of **22 hours per week** on caring duties.

Home modifications for **aging in place** are projected to be a **\$30B+ industry** by 2030.



# Caregiving Opportunities

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What consumer goods & home tech solutions can help?

- **Caregiver-friendly smart home tech**
- **Meal subscription & grocery delivery**
- **Automated support tools**



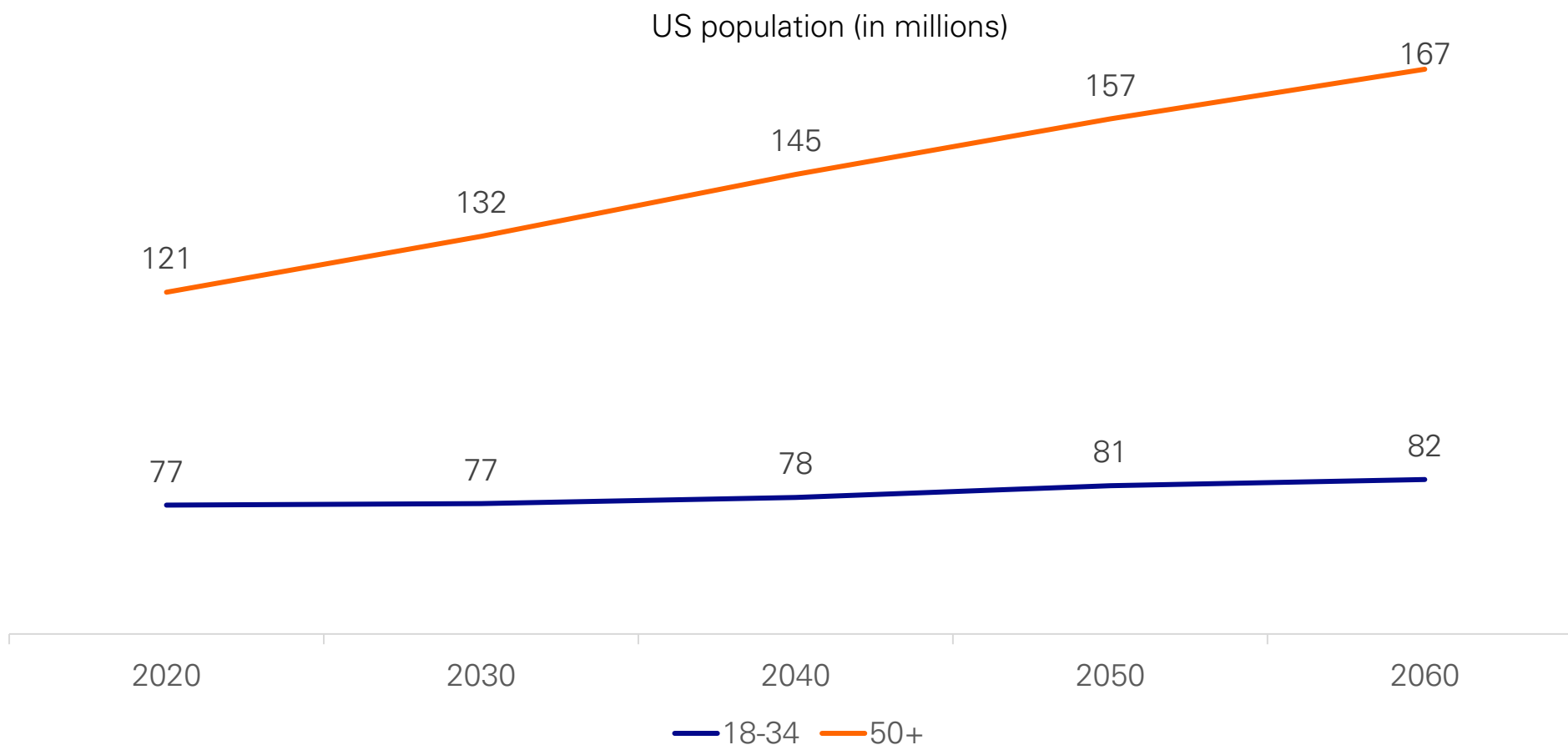
# 04. Longevity is reshaping health & wellness

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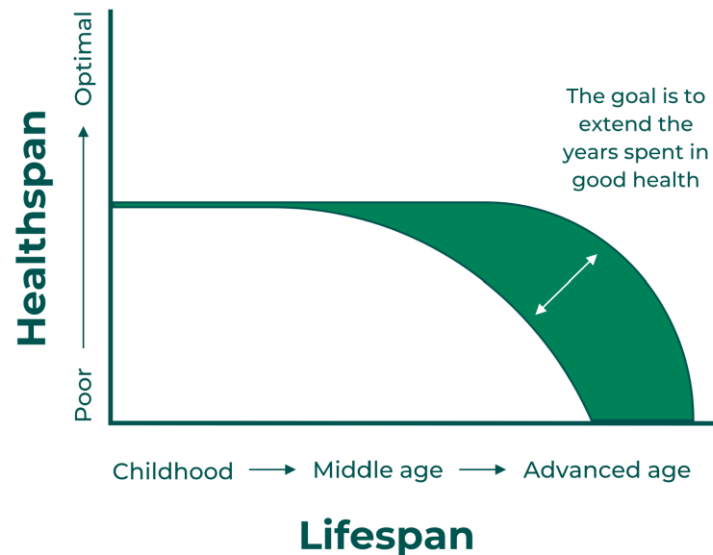
Consumers aren't trying to look younger – they're investing in living longer, better.



# Older adults are the fastest-growing demographic globally.



# The consumer shift toward prioritizing health span over life span is influencing everything from beauty to fashion to nutrition.



## 52%

Of consumers believe their health will improve over the next 5 years.

Source: Euromonitor International

## 34%

Of US adults aged 50+ owns a wearable device

Source: AARP 2024 Tech Trends and Adults 50+

*“Consumers are making behavioural changes now to benefit their future selves. Their goal is to live healthier for longer.”*

—  
Karolina Grigorijevaite  
Innovation Team Lead  
Euromonitor

# Healthcare: From reactive to proactive

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**70%**

of consumers report increased spending on longevity-focused healthcare & wellness.

**\$44B**

Projected size of longevity & anti-senescence therapy market by 2030



# Longevity Opportunities

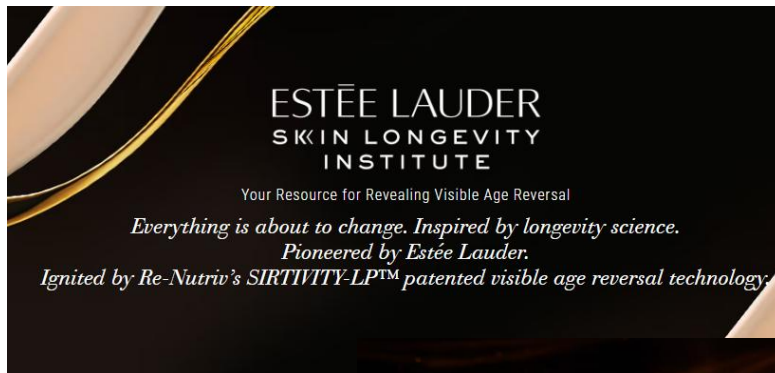
How should healthcare, med tech & age tech adapt?

- **AI-powered longevity diagnostics**
- **Aging-in-place technology**
- **Longevity clinics & concierge medicine**



# Beauty: Embracing aging. Embracing longevity

# L'ORÉAL



“ *Longevity adds a new dimension to beauty. Our investment in Timeline is exciting for its potential to transpose key hallmarks of longevity onto skin health and beauty.*

- **Barbara Lavernos,**  
**Deputy CEO,**  
**L'Oréal Groupe**

# Longevity Opportunities

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How will the beauty & skincare sectors pivot?

- **Regenerative & longevity skincare**
- **AI-driven personalized beauty**
- **Inclusive, pro-aging marketing**



# Fitness & Nutrition: Living better, longer.

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Longevity-focused fitness & nutrition is expected to be a **\$50 billion** market by 2030.

Demand for **longevity supplements** has surged by **35%** in the past 3 years.



# Longevity Opportunities

How do we bridge  
healthcare, consumer goods  
& wellness?

- **Longevity-focused strength & mobility programs**
- **AI-powered fitness coaching**
- **Biohacking & longevity nutrition**



# Horizon Trends to Watch

What's just starting now but could  
define the next decade?

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01

**Solo Aging**

And Care Gaps

02

**Brain Health**

And Cognitive Longevity

03

**Identity Shift**

Death of the "senior" label

## Recap

# 4 Key Drivers Shaping Aging & Business in 2025



**Gen X is  
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# 3 Things to Remember

**Aging isn't a  
niche.  
It's a \$22  
trillion  
opportunity.**

**1**

**Caregivers,  
women, Gen  
X are driving  
behavior  
change.**

**2**

**Longevity  
will redefine  
what  
wellness  
means.**

**3**

# The future is old. Are you ready for what's next?

- **Need to understand a fast-changing consumer?**
- **Rethinking messaging, marketing, or innovation strategy?**
- **Looking to build with, not just for, older adults?**

## **Let's talk.**

We partner with brands across sectors to turn insight into action.

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